


Utilization Plan: View Plan

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D47256H: Replace Roofs DOT Region 9, Broome CountyStatus: **Open**Estimated Cost: **\$175,412**

This Utilization Plan has been Approved. Scroll down to view the details of the plan. Click the button to transfer some or all of the subcontract records to an existing contract. Once a record is transferred it cannot be transferred again. However if any subcontractors are not included in the transfer they will remain available for transfer. After the transfer process is complete a Linked Contract field will appear to provide quick access to the contract. Use the Linked Contract field to access the contract that subs were previously transferred to.

[Refresh](#) [Actions & Notices](#)**Utilization Plan Summary**


PROPOSAL	D47256H: Replace Roofs DOT Region 9, Broome County
REFERENCE	47256H
PHASE	Original, version 0
STATUS	 Approved
NOTIFICATION DATE	4/3/2023 by Shafia Booker
DUE DATE	4/10/2023 5:00 pm US/Eastern
SUBMISSION DATE	4/14/2023 by SUSAN HEFFERNAN (MWBE Contact)
REVIEW DATE	4/14/2023 by Shafia Booker
REVIEWER PUBLIC COMMENTS	<p>Your plan has been Accepted As Noted for MWBE purposes only. The MWBE goal has not been waived or lowered. All listed subcontractors and suppliers must also be submitted for review and approval to the OGS Vendor Responsibility Group prior to participating in this project using the BDC329 form. Once contract is awarded, any additional subcontractor changes must be submitted to the Vendor Responsibility Group for review and approval (BDC329).</p> <p>Per our conversation your firm has agreed to continue its efforts to meet the remaining goal throughout the course of the contract.</p> <p>Contact our office if you need any assistance</p>
REVIEWER PRIVATE COMMENTS	Confirmed




Award To Contract

Utilization Plan Information









ESTIMATED BID / TRANSACTION AMOUNT	\$175,412
PRIVATE COMMENTS	Compliance Specialists, please ensure contractor identifies the proper credit to be granted to brokers, manufacturers, and suppliers.
VENDOR COMMENTS	this is to confirm Bid Amount \$175,412 to include \$10,300 allowance

Primary Bidder/Prime Contractor









Vendor Name	Cert	Inc in Goal	\$ Total	\$ Self Perf	\$ For Credit	Actions
 AN CURTISS CO INC	No	No	\$175,412	\$137,812 78.56%	-	View

Work Code Validation Symbol Legend:  All assigned work codes are valid;  Some assigned codes are not valid;  No assigned work codes are valid;  No work codes are assigned.

Subcontractors

Subcontractor Name	Sub Tier	Cert	Inc in Goal	Type	Valid Work Code	\$ Commit	\$ Self Perf	\$ For Credit	Actions
 Mechanical Testing, Inc NAICS 238220: Air system balancing and testing NIGP 99247: HVAC System Testing, Balancing and Troubleshooting Services	1		 WBE	Sub 100%		\$2,600 1.48%	\$2,600 1.48%	\$2,600 1.48%	View
 The Shepherd Group, LLC NAICS 423720: Plumbing equipment merchant wholesalers NAICS 423720: Plumbing and Heating Equipment and Supplies (Hydronics) Merchant Wholesalers NIGP 03167: HVAC Equipment, Accessories and Supplies (Not Otherwise Classified)	1		 WBE	Reg. Dealer 60%		\$35,000 19.95%	\$35,000 19.95%	\$21,000 11.97%	View

Goal & Waiver Summary

Goal Type	Goal	Plan	Status	\$ to Reach Goal	Waiver Status
Overall Goal	30.00%	13.45%	-16.55% below goal 	\$29,024	 Waiver Request saved
	The project was bid / estimated based on self performing all work. Electrical WBE Subcontracor that we reached out to was not interested due to unavailability. Requested a list of interested Electrical Subs from OGS, however, could not find anyone interested in traveling to Binghamton area or there was no interest / availability in the vicinity.				
	Attached files:				
	  em 03.29.23 Aleut Elec - Fwd OGS Binghamton DOT - Electrical Proposal Request.pdf			Type PDF	Size 167.66 KB
					Description
MBE	15.00%	0.00%	-15.00% below goal 	\$26,312	 Waiver Request saved
The project was bid / estimated based on self performing all work. Supplier and Balancing Subcontractor utilized are WBE					
WBE	15.00%	13.45%	-1.55% below goal 	\$2,712	 Waiver Request saved
The project was bid / estimated based on self performing all work. Supplier and Balancing Subcontractor utilized are WBE					

Signature

SIGNATURE	Susan Heffernan
TITLE	President

ORGANIZATION

AN CURTISS CO INC

SIGNATURE DATE

4/14/2023

Additional Instructions

ADDITIONAL INSTRUCTIONS TO
VENDOR

SPECIAL INSTRUCTIONS TO VENDOR

The MWBE utilization credit for Work performed by MWBEs will be determined as follows: a. Where an MWBE is not the Contractor - MWBE utilization credit will vary depending on how the MWBE performs Work under the Contract, as follows: i. Where the MWBE performs Work under the Contract as a subcontractor, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE performs Work under the Contract as a manufacturer, MWBE utilization credit will be 100% of the dollar value of the Work performed by the MWBE. ii. Where the MWBE assists in the performance of the Work under the Contract as a supplier, MWBE utilization credit will be 60% of the dollar value of the Work performed by the MWBE. For purposes of this Contract, a supplier is a firm that operates a store, warehouse, or other establishment where materials, supplies, or equipment required under the Contract are bought, kept in stock, and regularly sold or leased to the public in the usual course of business. Suppliers purchase and sell products as their principal business under their own name. A supplier must purchase and keep materials in stock and have a method to sell those materials to the public, through a storefront or website, and cannot supply materials specifically for a single contract. Suppliers of large bulk items must derive over 40% of their business from inventory in their warehouse and must take legal responsibility of the items, even if some items are drop-shipped. iv. Where the MWBE assists in the performance of the Work under the Contract as a broker, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a broker is a firm that fills orders for a client by ordering, purchasing, or receiving supplies from a third-party supplier rather than out of its own existing inventory and, in light of the standard industry practices, provides no substantial services other than acting as an intermediary between a supplier and a customer. v. Where the MWBE assists in the performance of the Work under the Contract as a manufacturer's representative, MWBE utilization credit will be equal to the percentage of the commission, or the mark-up percentage, of the items brokered, applied to the dollar value of the Work performed by the MWBE. For purposes of this Contract, a manufacturer's representative is considered to be a broker.

[Customer Support](#)

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